

County of San Mateo's Transformation Journey: Modernizing Document Capture

The Client

- > County of San Mateo – Assessor-County Clerk-Recorder & Elections.
- > Provides services for property assessment, vital records, and elections.

The Challenge

- > Legacy FileNet Capture system was unsupported and limiting.
- > Delayed access to critical documents impacted service delivery.
- > Relied on manual sorting and indexing for batch scanning.

The Solution

- > Implemented Tungsten TotalAgility for document classification, indexing, and validation.
- > Decentralized scanning processes to improve efficiency across departments.

The Benefits

- > Faster processing, improved access, and greater compliance.
- > Strengthened data governance, compliance, and security features.
- > Enabled easier, faster access to information for staff and constituents.

Overview

Nestled in the picturesque San Francisco Peninsula, the county of San Mateo houses the Assessor-County Clerk-Recorder & Elections (ACRE) Department. ACRE is committed to service excellence and is responsible for assessing Real Property and Business Personal Property, recording and maintaining real property transactions, issuing vital records, and election administration. The department's Motto is "people first", it aims to continue moving into the future and staying current on the latest technologies.

The ACRE Department Strategic Plan incorporates the use of state-of-the-art technology in providing its constituents services. The Department recognized that its outdated document capture system needed to be replaced with a system that improves its operational excellence through automating document recognition and enabling intelligent data acquisition.

After researching alternate solutions, ACRE issued an RFP and received proposals from several companies. Following a competitive evaluation process, the ACRE team selected Genus Technologies to help guide them on their quest to modernize the department's document scanning and capture process.

Challenges

ACRE worked with manual sorting and indexing processes, where incoming documents had to be combined into batches according to the document type since the legacy scanning system supported only batch scanning. Manual sorting and indexing often created inefficiencies and delayed ingestion of documents.

Additionally, the legacy system created a bottleneck for indexers since they had to use specific workstations to complete their task. Moreover, the Department's FileNet Capture legacy system was no longer supported which presented sustainability risks and hindered operational agility.

ACRE needed to replace FileNet Capture, move away from batch scanning and to exploit existing technologies that would introduce efficiencies and improve productivity through automation and machine learning.

Recognizing the need for digital transformation and modernization, ACRE began a journey to modernize its system, streamline workflows and ensure compliance in an increasingly tech-driven environment.

Solution

In a strategic partnership with Genus Technologies, ACRE embraced Tungsten Automation's (formerly Kofax) TotalAgility as the cornerstone of its document capture transformation initiative.

With a focus on decentralizing scanning operations and automating document classification, indexing, and validation, TotalAgility was the perfect fit for the department. Genus facilitated a seamless implementation and configuration process, laying a new foundation for enhanced efficiency and productivity.

Collaborating closely with the Genus project team, ACRE found more than just a service provider—they discovered dedicated partners committed to their success today and in the future. The Genus team continues to be accessible, knowledgeable, and invaluable in assistance every step of the way.

"We have built a trusted relationship with our Genus project team," says Nelly Mikhael, ACRE Project Manager. "We trust what they have to say and the advice they give us. We've forged a true partnership and a very successful relationship with the Genus team."

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The Genus team has been very helpful in getting us to where we want to be and continue to help us fill in very major components of our continuous operation plan. ”

~ Bo Hammil, ACRE Information Technology Manager

Results

The collaboration between ACRE and Genus resulted in successful outcomes, including a significant milestone in the department's vision to utilizing innovation and technology to set the standard of excellence in serving the people of San Mateo County. The implementation of TotalAgility led to substantial reductions in processing times, enabling the ACRE team timely access to documents which supported the goal to improve services to staff and constituents.

Decentralized scanning operations enhanced document availability, enabling seamless access to critical information. Moreover, TotalAgility's robust security features ensure compliance within stringent governance standards, bolstering ACRE's reputation as a model of innovation and efficiency in a digital transformation era.

The Genus partnership not only streamlined operations but also laid a new foundation for enhanced efficiency and productivity, driving ACRE's continued technology transformation forward.

Summary

The County of San Mateo's Assessor-County Clerk-Recorder & Elections (ACRE) Department embarked on a transformative journey to modernize their document capture processes, recognizing that their outdated FileNet Capture system and manual workflows were causing inefficiencies.

To address these challenges, ACRE partnered with Genus Technologies, adopting Tungsten Automation (formerly Kofax) TotalAgility to decentralize scanning operations and automate document classification, indexing, and validation. This strategic move aimed to improve operational agility, productivity, and compliance by integrating state-of-the-art automation technologies.

As a result, ACRE achieved substantial reductions in processing times and enhanced document accessibility, ensuring faster and more efficient services for staff and constituents. The implementation also strengthened data security and compliance within strict governance standards.

The collaboration with Genus Technologies proved invaluable, building a trusted partnership that supported ACRE's ongoing digital transformation and positioned them as a model of innovation and efficiency in the public sector.

About Genus Technologies

Genus Technologies is a systems integrator with over 25 years of experience in solving complex digital transformation challenges. Genus has a proven track record of delivering successful projects in digital experience, process transformation, content services, intelligent document automation, and digital asset management for leading organizations across industries including finance, insurance, healthcare, manufacturing, logistics, and government.

[GenusTechnologies.com](https://www.genustechnologies.com)

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